

CASE MANAGEMENT FILE CHART ORDER

INSIDE OF LEFT COVER:

Written Face Sheets
Dangerous Propensities
Medi-Cal/Medicare/Green Cards in plastic sleeve or envelope

INSIDE RIGHT (ON TOP OF PATIENT DATA TAB):

Client Checklist
C.M. File Chart Order

RIGHT SIDE OF FILE CHART: Title/Contents

1. Patient Data

- 1.1 Client Information Face Sheet (INSYST)-current
- 1.2 Client/Service Info (CSI) Update
- 1.3 Episode Opening/Closing (Pink Sheet)
- 1.4 Utilization Review Committee Record

2. Assessment

- 2.1 Community Function Evaluation
- 2.2 Conservatorship Investigation Report
- 2.2 Conservatorship Statement of Facts
- 2.3 Forensics Evaluation
- 2.4 Initial Assessment
- 2.4 Old Initial Assessments
- 2.5 Referral Form
- 2.6 Psychological Testing

3. Treatment Plan

- 3.1 Client Plans
- 3.2 Crisis Plans

4. Progress Notes

- 4.1 Progress Notes
- 4.2 Six-month Review & Progress Note
- 4.3 Transfer/Discharge/Admission Summary & Checklist

5. Medical

- 5.1 Diagnosis Confirmation Letter
- 5.2 Lab Test
- 5.3 Medical History Questionnaire
- 5.4 Other Medical Reports/Dental, etc.

6. Legal

- 6.1 All Legal Documents from the Court
- 6.2 Court Grams
- 6.3 LPS Re-establishment (blue sheet)
- 6.4 Medical Rec. & Declaration for Re-establishment of Conservatorship

7. Administrative

- 7.1 Advisement (pre-HIPAA)
- 7.2 Agreement for Services
- 7.3 Consent for Involvement of Interested Parties
- 7.4 Financial Agreement
- 7.5 Medi-Cal Documents
- 7.6 Medicare Notices (last 3 years)
- 7.7 Notice of Privacy Practices Receipt
- 7.8 Property Storage Agreement
- 7.9 Release of Information (HIPPA)
- 7.10 SSA 07-94
- 7.11 SSA-II-Bk (Request to be payee)
- 7.12 SSA/SSI Applications & Re-determinations
- 7.13 Trusts
- 7.14 VA Documents

8. Financial

- 8.1 08-46 (Instructions to Sub. Payee)
- 8.2 Bills/Receipts
- 8.3 Client Pay Stubs
- 8.4 Subpayee Ledgers

9. Correspondence

- 9.1 Interoffice Memos
- 9.2 Received/Sent Letters

10. Miscellaneous

Augmented Services Scoring Tool
Authorization for Medi-Cal Day Tx
Birth Certificates
IMD Discharge Summary
Prior Record
Records from Other Sources
Renter's Agreements
Renter's Assistance
Service Requests

Not to be filed in chart:

Morning Report

Peer Review Checklist

Serious Incident Report

Voters' Registration

H:Policy & Procedures 3/2004